PERFORMANCE MANAGEMENT

The purpose of this policy is to ensure that all employees are provided with accurate and appropriate feedback regarding their performance within the company. By utilizing a performance management system, [Organization Name] will work with its employees to ensure organizational objectives are met through the achievement of individual performance goals and objectives.

[Organization Name] values its workforce and will endeavour to aid in employee achievement of professional goals and objectives. Performance management will be utilized as a tool to help ensure the alignment of individual performance goals with that of the strategic direction of the company through the use of collaborative performance planning, coaching and feedback, and annual performance reviews.

POLICY

All employees will be subject to performance reviews. Reviews will be based upon performance standards, goals and objectives identified in employees’ respective job descriptions.

Performance reviews are designed to help keep employees on the right track with direction and goals that will lead to their continuous improvement and provide career advancement opportunities. Performance reviews assist in the identification of strengths and areas of opportunity in organizational abilities and capacities that will aid in the development of effective training, employee placements and productivity forecasts.

Performance reviews will be benchmarked against previously determined goals and objectives for the position. [Organization Name] requires that all employees and supervisors/managers take part in the performance management process with records of individual performance plans and reviews to be discussed and kept on file for each employee.

All information including performance management forms and discussions in performance management meetings will be kept strictly confidential.

**Frequency**

Performance reviews will be conducted for all employees near the end of their probationary period. Performance reviews will also be conducted [Insert e.g., every 6 months] and annually.

**Performance Review Process and Pay Increases**

At the discretion of the employer, pay increases may be provided to employees based on the outcomes of the performance management review(s)/process.

The employer reserves the sole right to determine whether a pay increase, based on the outcome of the performance management review(s)/process will be provided to the employee. Moreover, the employer reserves the sole right to determine the amount of any such pay increase should it be provided.

Any increases are approved by the immediate supervisor, department lead and [Insert, e.g., Finance Director].

**Performance Management Process**

Planning

[Organization Name] management will review employee job duties and requirements in order to identify key areas of responsibility. Areas of responsibility will be utilized to aid management in creating individual performance plans for each employee.

Each employee will have a performance plan created for them within designated timeframes based upon prior performance, length of time with the company, length of time with the department, and recent promotions or significant changes in duties and responsibilities.

Coaching and Feedback

Coaching will be continually utilized by supervisors/managers throughout the performance review period. The coaching period will consist of informal and formal feedback being provided to the employee directly pertaining to the progress of the individual towards their established goals and objectives.

Formal feedback sessions will be scheduled for each employee at the mid-point range of the performance review period, or as required based upon the individual’s performance and length of time with the company and within the department. The formal feedback session is conducted to allow for discussion of the employee’s progression towards the established goals and objectives. At this point performance concerns may be formally addressed and documented and the performance plan may be formally altered.

Review

At the conclusion of the performance review period all supervisors/managers will be required to schedule time with each of their employees to conduct a year-end or period ending performance review. At [Organization Name] the first review will take place after [Insert e.g., three (3) months] of employment. Prior to the scheduled performance review meeting supervisors/managers will complete a performance review for each employee based upon the individual’s established goals and objectives. The employee will be given the opportunity to review the performance review and add any additional comments they feel necessary.

The performance review meeting will consist of:

* A full review and discussion of the individual’s performance in the review period based upon the goals and objectives established in the performance plan;
* A full review and discussion of the individual’s performance review; and
* The establishment or amendment of the employee’s performance plan for the upcoming performance review period.

Both the employee and the supervisor/manager will be required to sign and date the newly created performance plan with a copy being kept on the employee’s file.

**Employee Performance Plans**

Performance plans should be created or updated yearly and at the end of the performance review period for each employee who is no longer considered probationary and is not exhibiting any performance problems. Employees in this category must also have at least one (1) formal feedback meeting with their supervisor/manager.

New, probationary employees should have a performance plan created for them within their first week of employment. A formal review should be held at the end of the probationary period or earlier if the employee is exhibiting performance problems.

Employees who have been promoted, have changed departments, or have had their duties or responsibilities significantly changed should have a performance plan created within the first week of their new position. A formal feedback meeting should be scheduled within the first three (3) months so that performance and progression towards established goals and objectives may be assessed within the new role.

Goal Setting

Each Performance Plan will include the following information:

* A set of specific goals and objectives for achieving the requirements of the job;
* An action plan or outline of how these goals or objectives will be met; this may include plans for training and development;
* A timeframe for when goals or objectives should be met by the employee; and
* Additional comments and areas of concern or anticipated restraints.

The performance plan will be reviewed by the employee with their supervisor/manager to discuss the goals and objectives that have been established. The performance plan will be utilized to not only establish performance objectives but will also act as a tool for which actual performance can be measured against.

The contents of the performance plan will be reviewed and discussed by the employee and the supervisor/manager, and amendments can be made as appropriate. At the conclusion of the discussion all parties must sign off on the plan and it must be placed in the employee’s file.

*These plans are changeable and can be amended throughout the course of the performance review period.*

**Complaint Process**

Employees who feel they have been subject to an unfair performance review or who believe their performance plans to be out of the scope of their normal duties and responsibilities should forward a request for review to management/the Human Resources Department.

Upon receiving a request, the issue will be looked into and if necessary, a formal investigation will be conducted which could include a formal review of any performance management forms submitted, review of previous performance plans and reviews, interviews with the employee and the supervisor/manager and an investigation into current and past performance.